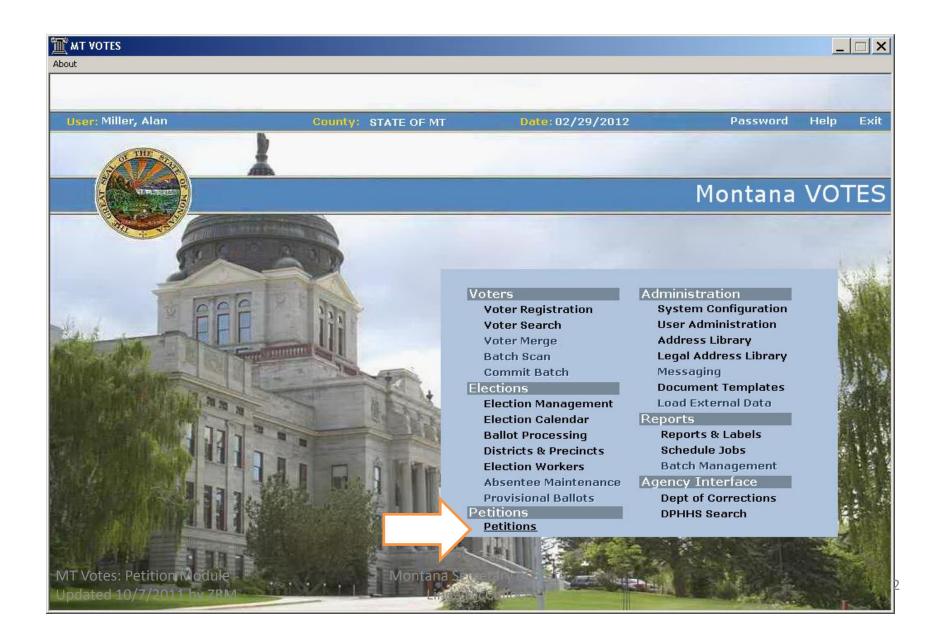


Office of Montana Secretary of State Linda McCulloch

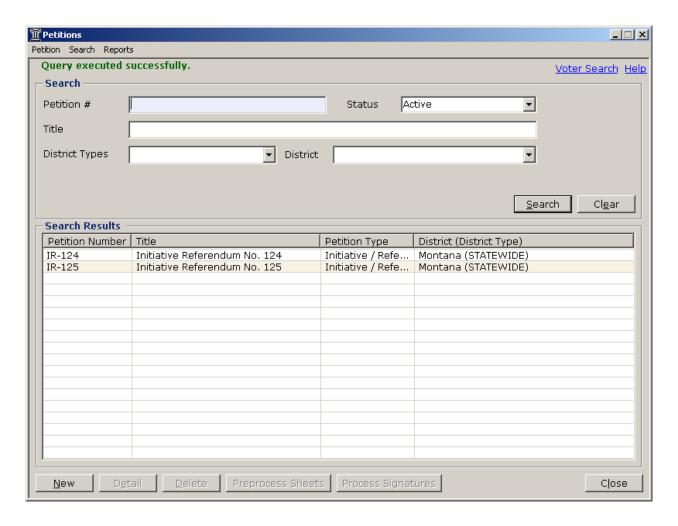


Petition Processing

Click on Petitions to access the petition Module

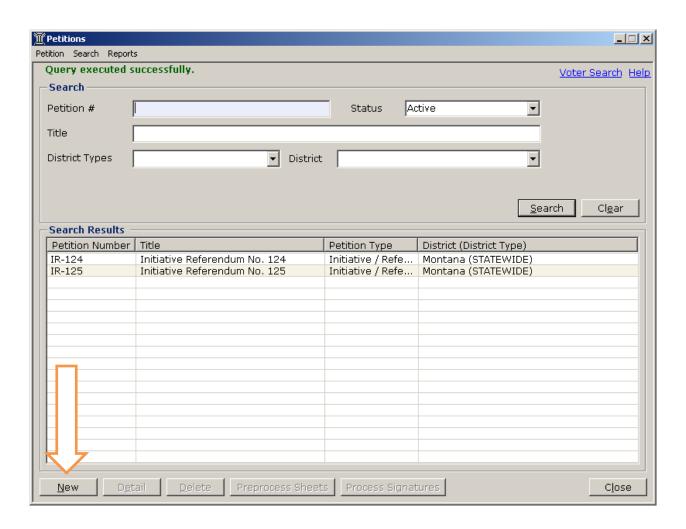


The petition search screen will display. You can search by: petition #, title, district type, status, or district. If you search by title, you can use the full title or the wildcard (%).

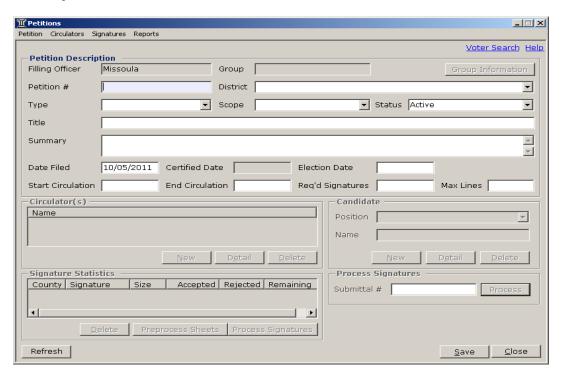


ADDING A NEW PETITION:

Click the "new" to begin



Enter in all available information for the new petition. For statewide petitions, the SOS office staff will enter the petition.

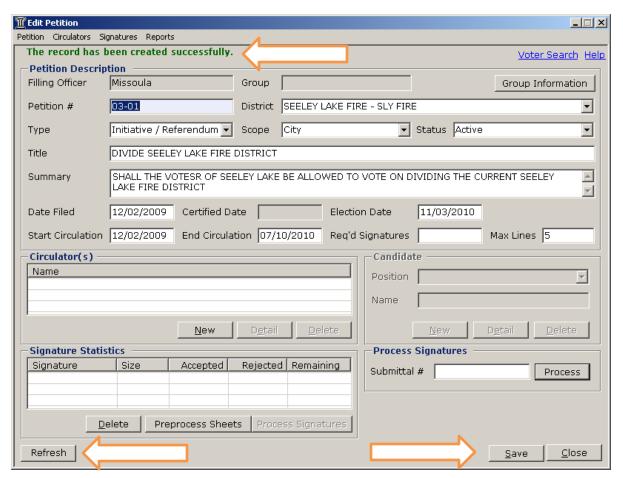


NOTE: If you receive a statewide petition such as a presidential petition or independent legislative petition, let the SOS office know so that the SOS office staff can enter the petition.

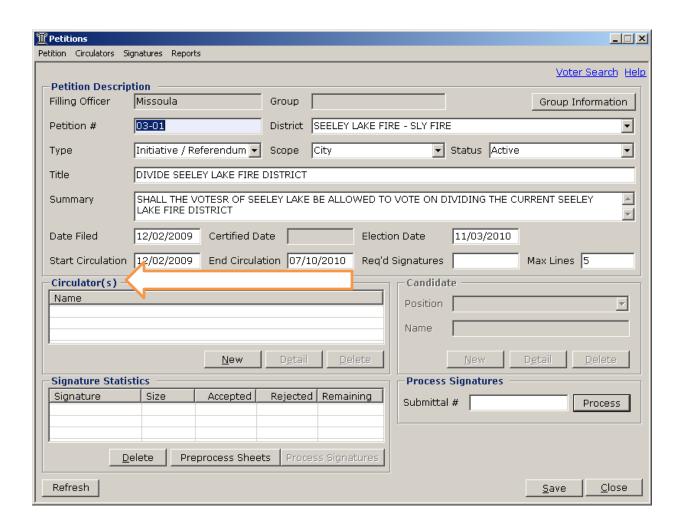
Click the "Save" button once all information has been entered.

A confirmation message will display at the top of the screen.

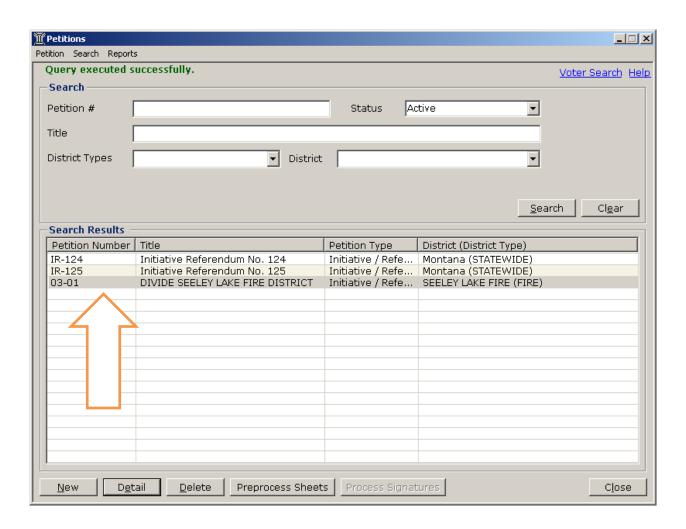
Click the refresh button at the bottom left before moving on.



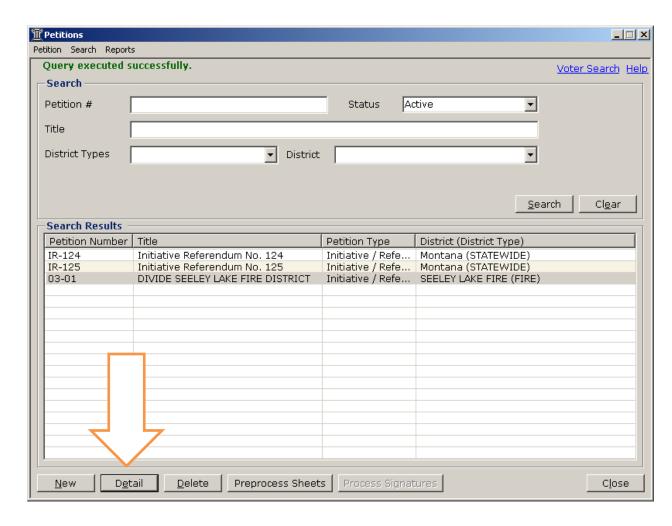
CIRCULATORS CAN BE ADDED AT THIS POINT, OR ONCE YOU HAVE RECEIVED SUBMITTALS.



THE NEW PETITION WILL NOW DISPLAY ON THE MAIN PETITION MODULE SEARCH SCREEN.



CLICK ON THE NEW SUBMITTAL TO HIGHLIGHT IT. CLICK THE DETAIL BUTTON TO VIEW FULL PETITION DETAILS.



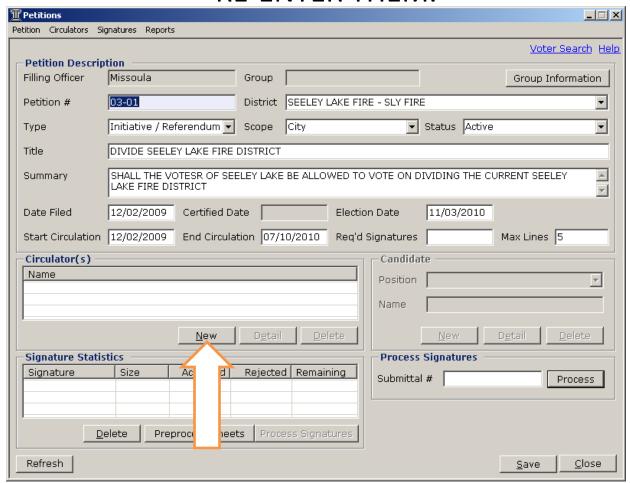
PREPROCESS SHEETS
WILL ALLOW YOU TO
DIRECTLY BEGIN
SETTING UP
SUBMITTALS TO ADD
SIGNATURES.

PROCESS SIGNATURES
ALLOWS YOU TO ADD
SIGNATURES TO A
PREVIOUSLY SETUP
SUBMITTAL.

THIS OPTION IS ONLY
AVAILABLE ONCE YOU
HAVE CREATED
SUBMITALS ON
PREPROCESS SHEETS.

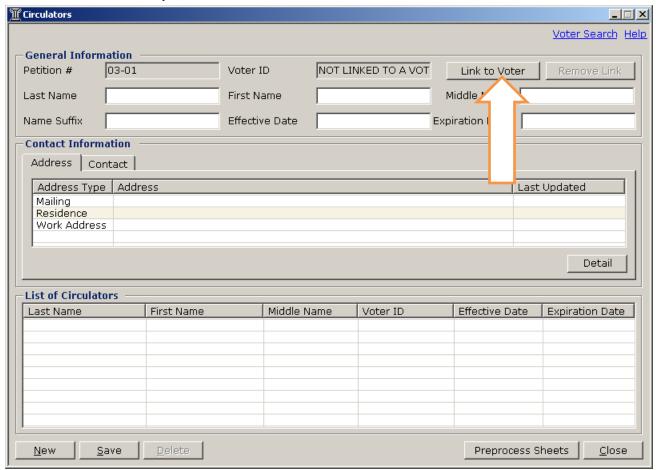
ONCE YOU HAVE RECEIVED SUBMITTALS YOU MUST ENTER THE CIRCULATOR BEFORE YOU CAN PROCESS THE SHEETS.

IF THE CIRCULATOR IS ALREADY PRESENT YOU DO NOT HAVE TO RE-ENTER THEM.



CIRCULATOR INFORMATION CAN BE ENTERED MANUALLY OR BY LINKING TO A PRE-EXISTING VOTER RECORD.

ENTER THE CIRCULATOR'S NAME BEFORE ATTEMPTING TO LINK TO VOTER, SO SEARCH RESULTS ARE LIMITED.



NOTE: For statewide ballot issues, circulators must be residents of the state but you do not need to verify their residency, and they do not need to be registered voters.

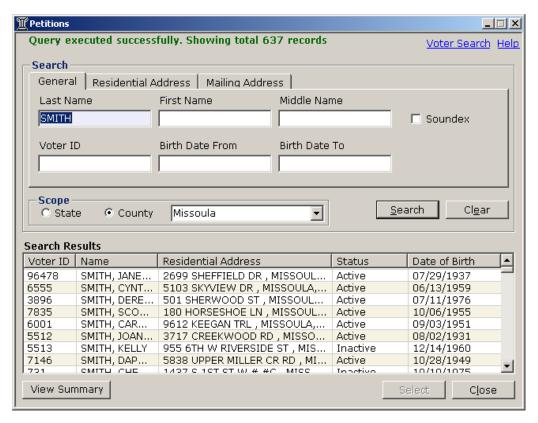
(For candidate and party qualification petitions, circulators do not need to be residents of Montana.)

Circulators											_ ×
								_		Voter Se	arch Help
⊢General Informa	ation —										
Petition #	03-01		Voter II)	NOT LIN	KED TO A VOT		V	ter	Remove	Link
Last Name			First Na	me			Midd	ne	• [
Name Suffix			Effective	e Date			Expirat	ate	, <u> </u>		
Contact Informa	tion				'						
	tact										
									,		1
Address Type Mailing	Address								Last	t Updated	
Residence											
Work Address											
										De	tail
List of Circulators											
Last Name		First Name		Middle Name		Voter ID		Effective Date		Expiration Date	
Edde Name	1111.	oc ivalile		r-liadic 14	anic	VOCCI ID		CCCIVC	<u> </u>	_ Expiración	Date
L											
New Save Delete Preprocess Sheets Close											

THE SEARCH WILL RUN AUTOMATICALLY ONCE YOU CLICK "LINK TO VOTER".

IF THE CIRCULATOR DOES NOT APPEAR YOU CAN ENTER MORE SPECIFIC

SEARCH CRITERIA OR ENTER THEIR INFORMATION MANUALLY.



IF A SINGLE EXACT MATCH IS FOUND WHEN CLICKING THE LINK TO VOTER BUTTON IT WILL AUTO FILL IN THAT INDIVIDUAL'S INFORMATION WITHOUT DISPLAYING THE SCREEN ABOVE.

VERIFY ALL MANUALLY ENTERED, AND SYSTEM-POPULATED, INFORMATION FOR ACCURACY.

CLICK SAVE. TCirculators Voter Search Help **General Information** Petition # 03-01 Voter ID 96478 Remove Link JANET Middle Name L SMITH First Name Last Name Expiration Date Effective Date Name Suffix Contact Information Contact Address | Address Type | Address Last Updated Mailing 10/06/2011 Residence 2699 SHEFFIELD DR, MISSOULA, MT 59808 Work Address Voter Address 2699 SHEFFIELD DR, MISSOULA, MT 59808 Detail List of Circulators First Name Middle Name Voter ID Effective Date Last Name Expiration Date

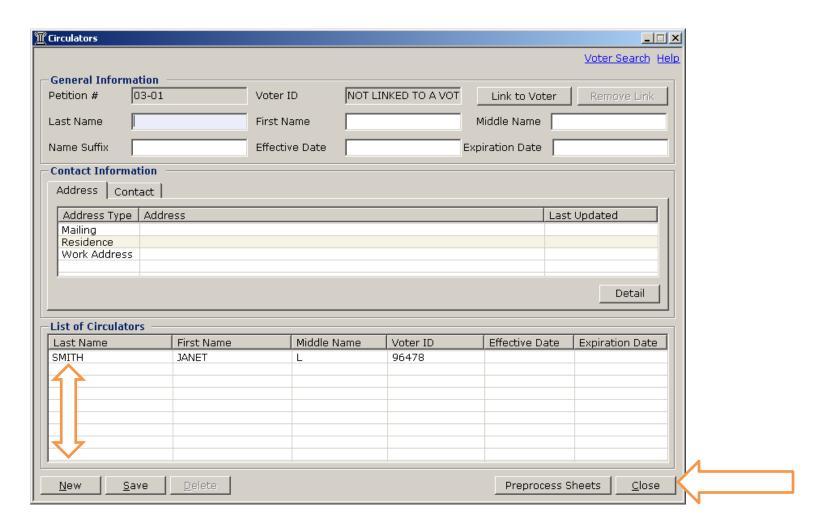
<u>N</u>ew

Save

Preprocess Sheets

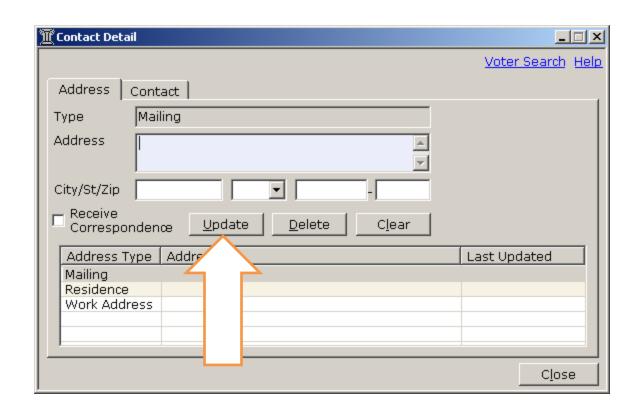
Close

THE NEW CIRCULATOR WILL DISPLAY IN THE LIST OF CIRCULATORS. ADDITIONAL CIRCULATORS CAN BE ADDED OR YOU CAN CLICK CLOSE TO EXIT.



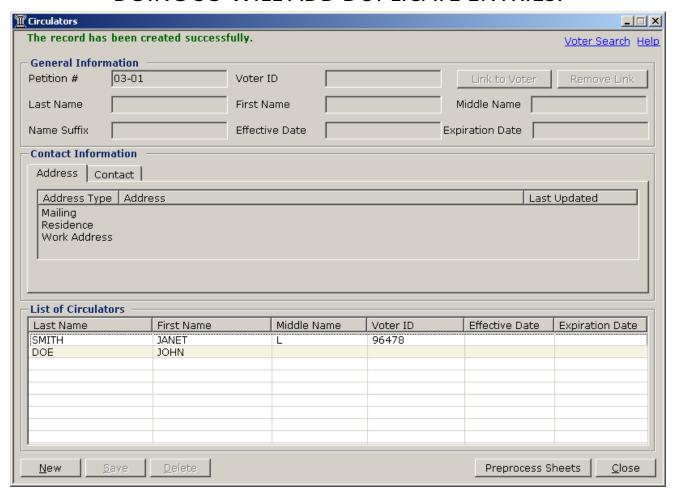
THE SCREEN BELOW WILL DISPLAY WHEN MANUALLY ENTERING IN CIRCULATOR INFORMATION.

BE SURE TO CLICK UPDATE TO SAVE ANY INFORMATION ENTERED BEFORE CLICKING CLOSE.

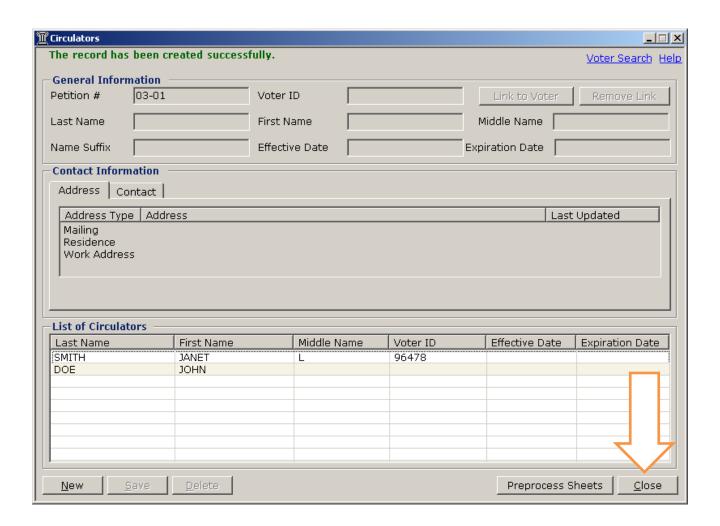


ONCE A CIRCULATOR HAS BEEN ADDED YOU DO NOT HAVE TO ADD THEM AGAIN IF YOU RECEIVE ADDITIONAL SUBMITTALS.

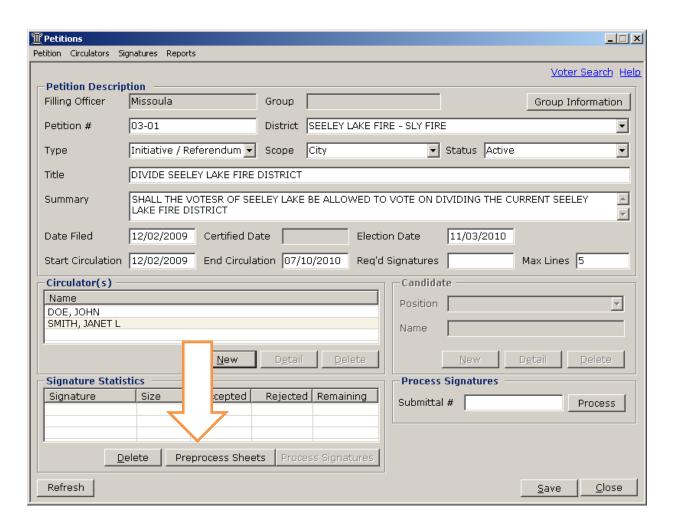
DOING SO WILL ADD DUPLICATE ENTRIES.



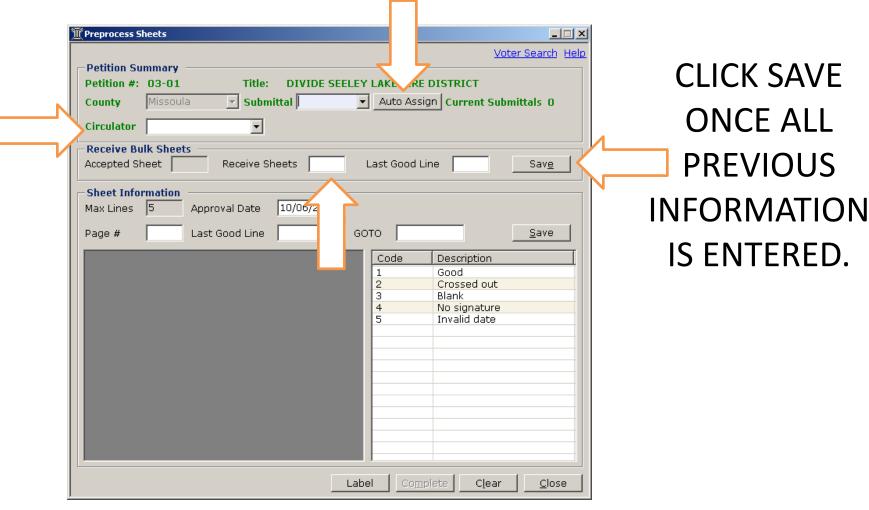
ONCE FINISHED, CLICK THE CLOSE BUTTON TO RETURN TO THE PETITIONS DETAIL SCREEN.



ONCE CIRCULATORS HAVE BEEN ADDED, CLICK THE <u>PREPROCESS</u> <u>SHEETS</u> BUTTON TO BEGIN PROCESSING A SUBMITTAL.

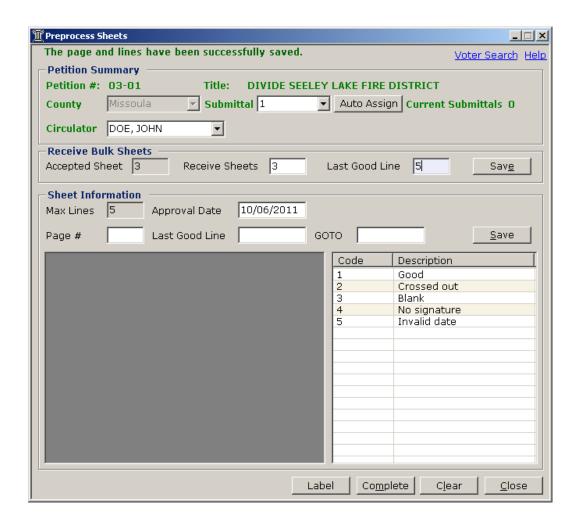


THE FOLLOWING INFORMATION WILL NEED TO BE ENTERED: SUBMITTAL NUMBER(AUTO ASSIGNED), CIRCULATOR, RECEIVED SHEETS AND LAST GOOD LINE.

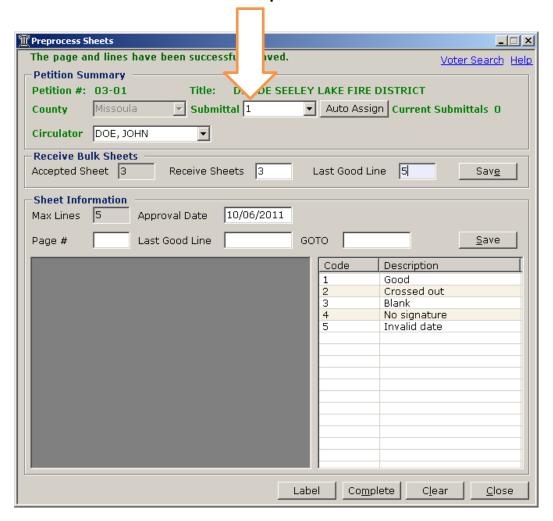


MT Votes: Petition Module Updated 10/7/2011 by ZRM

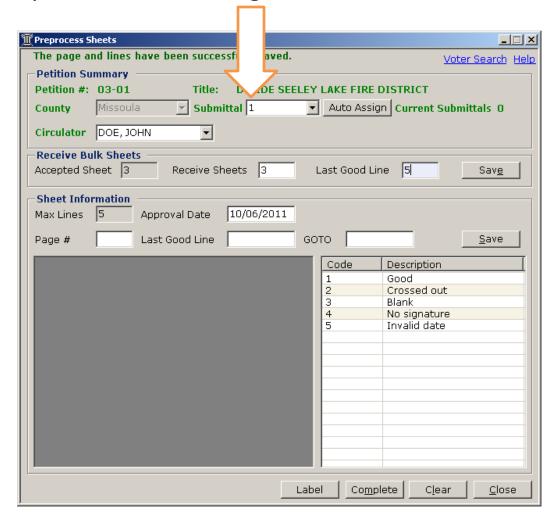
THE EXAMPLE BELOW IS HOW THE SCREEN SHOULD LOOK BEFORE ENTERING SHEET INFORAMTION.



NOTE: When you begin entering statewide petitions, you should start with submittal 1, even if another county is already on submittal 20. Each county and each ballot issue or candidate's petition should start with submittal 1.

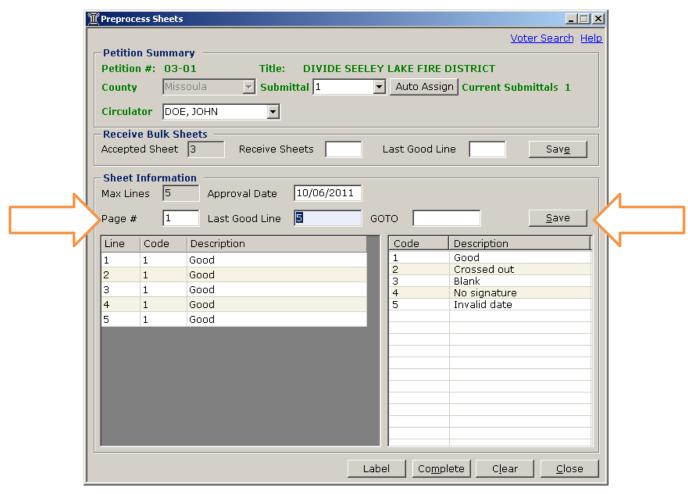


NOTE: Each submittal number corresponds to an affidavit of signature gatherer and the petitions attached to that affidavit. When you come to a new affidavit, you will need to assign a new consecutive submittal number.

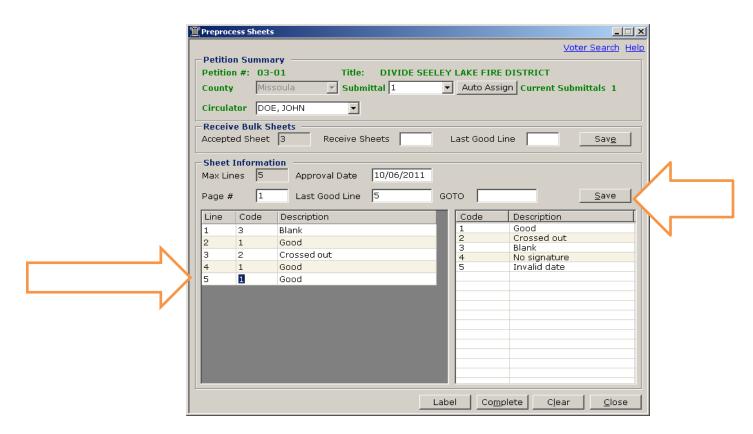


TO PROCESS SHEET INFORMATION, ENTER PAGE 1 AND THE SYSTEM WILL AUTOFILL THE LAST GOOD LINE ONCE YOU HIT TAB.

UPDATE LINE DESCRIPTIONS BY ENTERING A CORRESPONDING CODE FROM THE BOX TO THE LEFT. ONCE ALL ENTRIES ARE ACCURATE, CLICK THE "SAVE" BUTTON ONCE.



THE EXAMPLE BELOW OUTLINES A PAGE WITH A VARIETY OF LINE DESCRIPTIONS. CLICKING SAVE WILL ADVANCE YOU TO THE NEXT PAGE TO PROCESS.

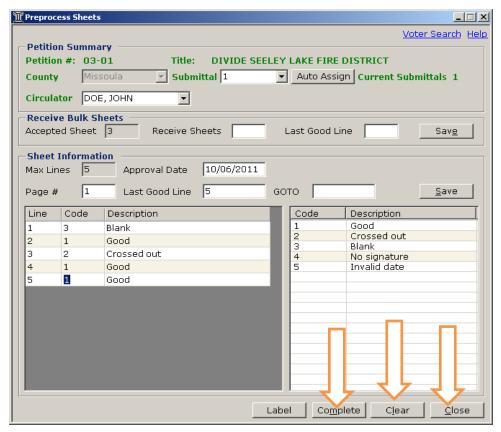


CAUTION

CONTINUING TO HIT SAVE AFTER PROCESSING THE ORIGINAL NUMBER OF PAGES SPECIFIED UNDER RECEIVED BULK SHEETS WILL CAUSE THE SYSTEM TO ADD ADDITIONAL PAGES TO YOUR SUBMITTAL.

CONTINUE TO ENTER THE SHEET INFORMATION UNTIL EACH PAGE HAS BEEN UPDATED.

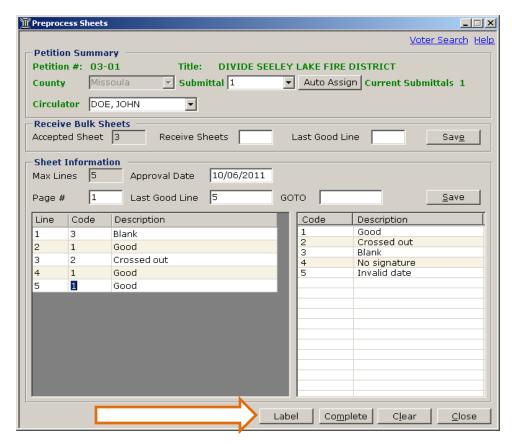
ONCE ALL THE PAGES HAVE BEEN PROCESSED CLICK THE "COMPLETE", "CLEAR" AND "CLOSE" BUTTONS.



CAUTION: THE COMPLETE BUTTON MUST BE CLICKED BEFORE CLICKING CLOSE.

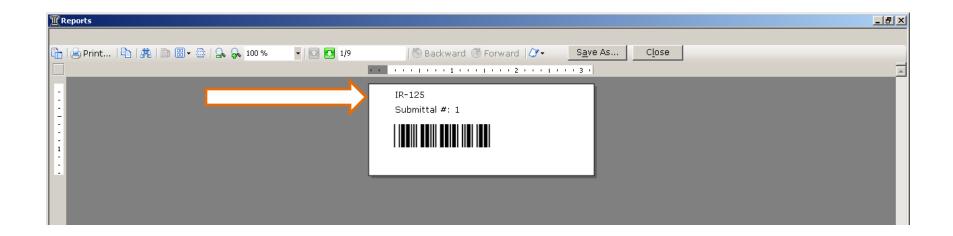
RECENT FUNCTIONALITY UPGRADES NOW ALLOW YOU TO GENERATE A BATCH OF LABELS WHICH CORRESPOND TO EACH SUBMITTAL YOU HAVE ENTERED.

CLICKING THE "LABEL" BUTTON WILL GENERATE A REPORT WHICH CONTAINS
A SINGLE BARCODED LABEL FOR EACH SUBMITTAL.



BELOW IS AN EXAMPLE OF A PETITION SUBMITTAL LABEL.

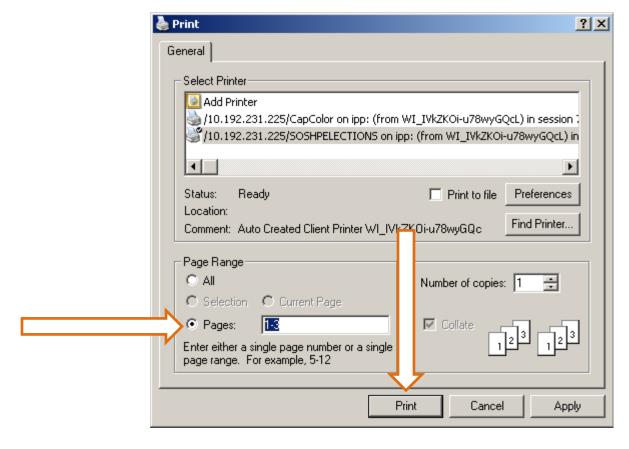
EACH TIME YOU GENERATE THIS REPORT IT WILL CREATE A LABEL FOR EVERY SUBMITTAL ENTERED IN THE SYSTEM.



WHEN PRINTING BE SURE TO SELECT THE APPROPRIATE PRINTER.

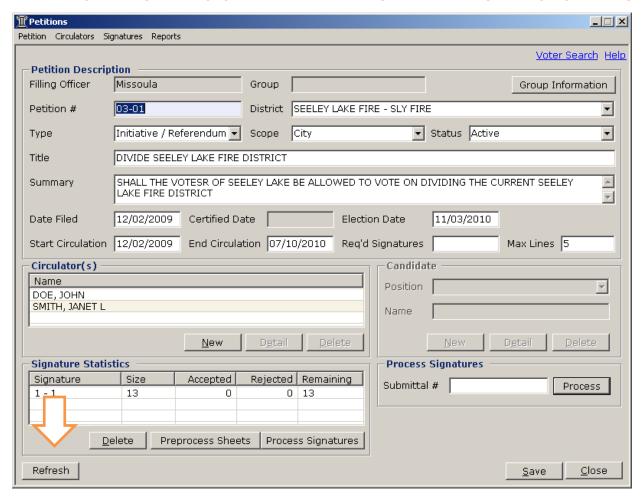
WARNING: IF YOU PREFER NOT TO PRINT EVERY LABEL, YOU CAN SPECIFY WHICH PAGES YOU WOULD LIKE BEFORE CLICKING PRINT.

NOTE: Even if you choose not to print labels, please be sure to number the affidavits with a submittal number.



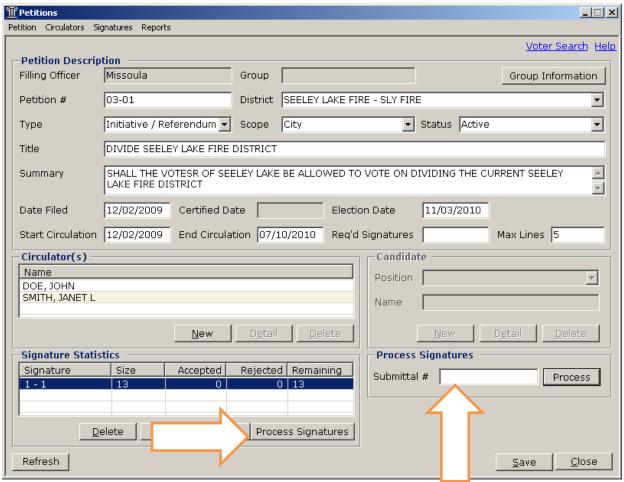
ONCE YOU HAVE CLOSED OUT OF PREPROCESS SHEETS YOU WILL RETURN TO THE PETITION DETAIL SCREEN.

CLICK REFRESH TO ENSURE ALL INFORMATION IS UP-TO-DATE.

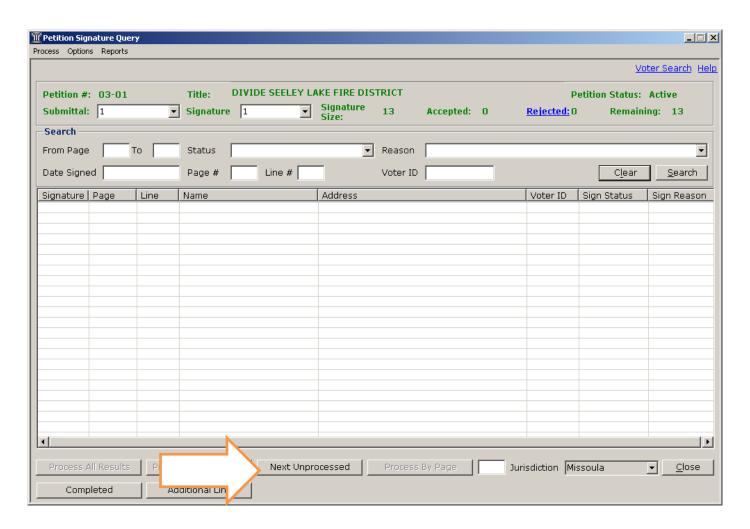


TO PROCESS SIGNATURES, HIGHLIGHT THE SUBMITTAL AND CLICK ON THE PROCESS SIGNATURES BUTTON.

ALTERNATIVELY, IF YOU HAVE ALREADY PRINTED SUBMITTAL BARCODE LABELS FROM PREPROCESS SHEETS, YOU MAY SCAN THEM IN THE PROCESS SIGNATURE FIELD.



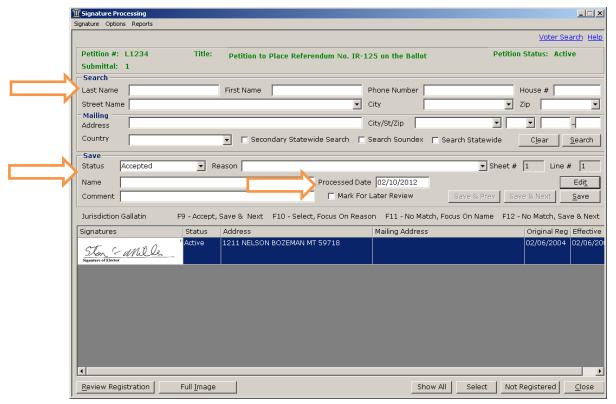
ON THE PETITION SIGNATURE QUERY SCREEN CLICK THE "NEXT UNPROCESSED" BUTTON TO BEGIN PROCESSING SIGNATURES.



THE SIGNATURE PROCESSING SCREEN ALLOWS YOU TO SEARCH FOR THOSE INDIVIDUALS THAT HAVE SIGNED THE PETITION YOU ARE WORKING.

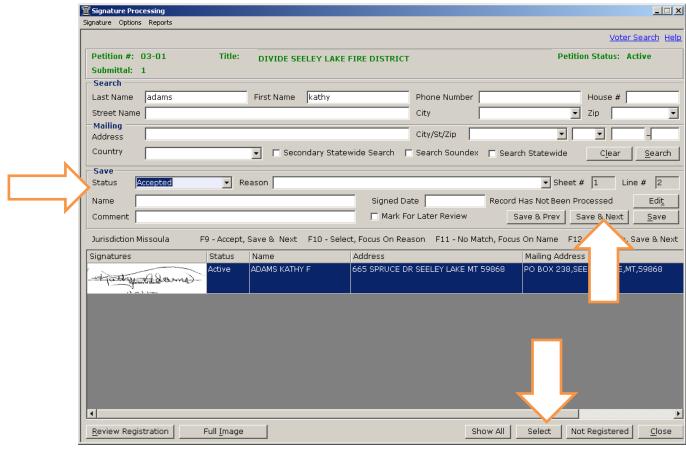
IF A VOTER RECORD IS FOUND IT CAN BE ACCEPTED OR REJECTED AS NEED. IF NOT FOUND IT IS REJECTED AS NOT REGISTERED.

NOTE: The Signed Date has been changed to the Processed Date, which will automatically default to the current system date. This date can be modified.

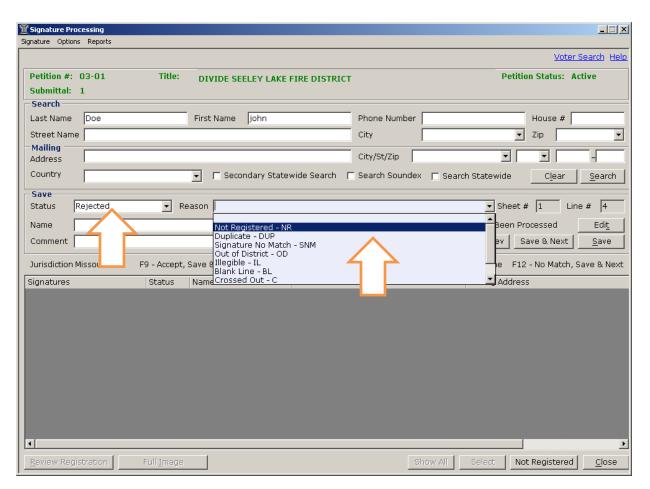


IF MULTIPLE SEARCH RESULTS DISPLAY, YOU WILL HAVE TO CLICK ON ONE TO HIGHLIGHT IT, AND THEN CLICK THE SELECT BUTTON TO REMOVE THE ADDITIONAL ENTRIES.

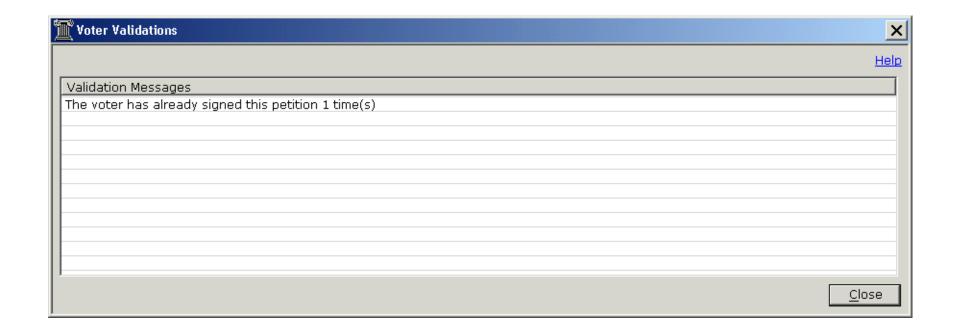
ENTER IN AN APPROPRIATE STATUS OF ACCEPTED OR REJECTED, AND THEN CLICK THE SAVE AND NEXT BUTTON TO CONTINUE PROCESSING SIGNATURES.



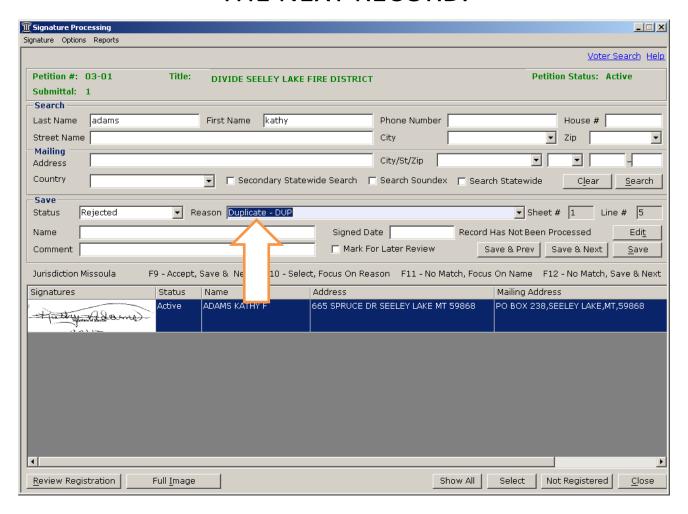
IF A SIGNATURE IS GOING TO BE REJECTED, BE SURE TO CHOOSE THE APPROPRIATE REASON FROM THE CORRESPONDING DROP-DOWN BOX.



ERROR MESSAGES, SUCH AS BELOW, WILL DISPLAY IF YOU ATTEMPT TO PROCESS SOMEONE THAT HAS ALREADY SIGNED THE PETITION, IS CANCELLED, OR IS NOT REGISTERED IN THE APPROPRIATE DISTRICT.

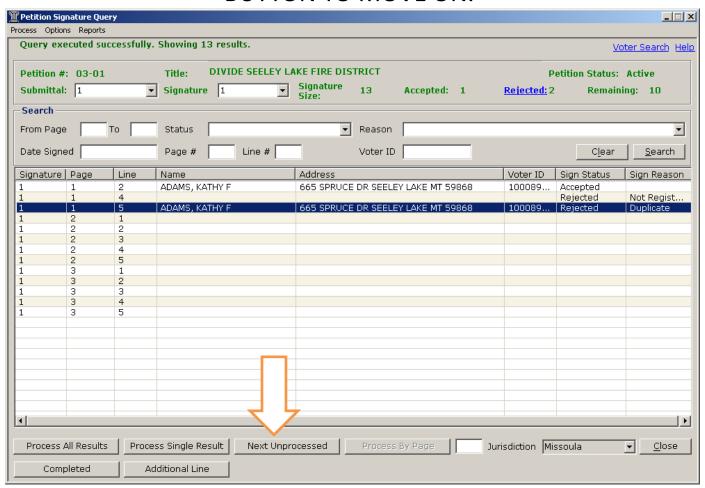


DUPLICATE ENTRIES WILL DEFAULT TO REJECTED, BUT YOU MUST INPUT THE DUPLICATE REJECTION REASON BEFORE MOVING TO THE NEXT RECORD.

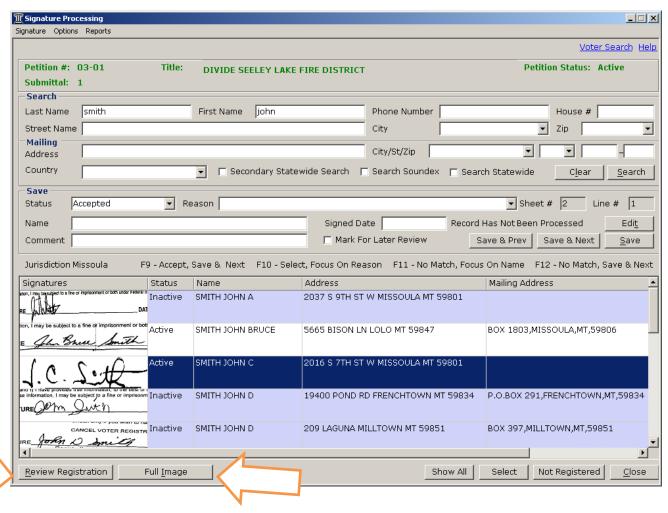


IF YOU LOSE YOUR PLACE, YOU CAN RETURN TO THE PETITION SIGNATURE SCREEN AND VIEW ALL PROCESSED LINES BY CLICKING THE SEARCH BUTTON.

WHEN YOU ARE READY TO CONTINUE, CLICK THE NEXT UNPROCESSED BUTTON TO MOVE ON.



THE "REVIEW REGISTRATION" AND "FULL IMAGE BUTTONS" WILL ALLOW YOU TO ACCESS ADDITIONAL INFORMATION FOR A VOTER.



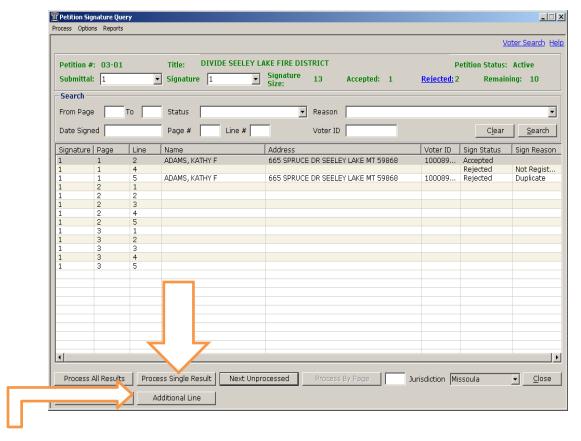
THE FULL IMAGE OPTION WILL ALLOW YOU TO ACCESS ALL IMAGES THAT HAVE BEEN SCANNED FOR THAT INDIVIDUAL.

Image Viewer	_ u ×	
@ Q D : ·	Voter Search Help Registration Card 4/29/2011 ▼	
75051 PM SMITH, JOHN C PM 2016 S 7TH W 2 APP	The various are to be a second or the second of the second	
MISSOULAMTS9801	The second secon	
PLACE LAST REGISTERED- CITY MSCA STATE ME COUNTY MSLA ADDRESS WHERE YOU LIVE 2016 5. 7 46 St. W.		
MAILING ADDRESS (if different than where you live) CHECK ONLY IF YOU WISH TO HAVE YOUR REGISTRATION CANCELLED: CANCEL VOTER REGISTRATION IN MISSOULA COUNTY You must contact your new county of residence if you wish to register in your new county—your registration is NOT automatically updated.		
Signature Date 4/20/11		

NOTE: The full image may be especially useful when signers have entered only a telephone number. They are allowed to write a telephone number on the petition if they choose not to write an address.

🎹 Image Viewer	X	
@ Q D f: -:	Voter Search Help Registration Card 4/29/2011 ▼	
SMITH, JOHN C PM 2016 S 7TH W 20 APR	The regions are great to the control of the control	
MISSOULAMT59801	FIRST, MIDDLE)	
(PLEASE PRINT LAST, FIRST, MIDDLE) DATE OF BIRTH \$/23/\$2PHONE # 2064376 FORMER NAME (If Changed) PLACE LAST REGISTERED-CITY MSCA STATE MT COUNTY MSCA ADDRESS WHERE YOU LIVE 2016 5. 7 45 55		
MAILING ADDRESS		
Signature J. C. S. H.		

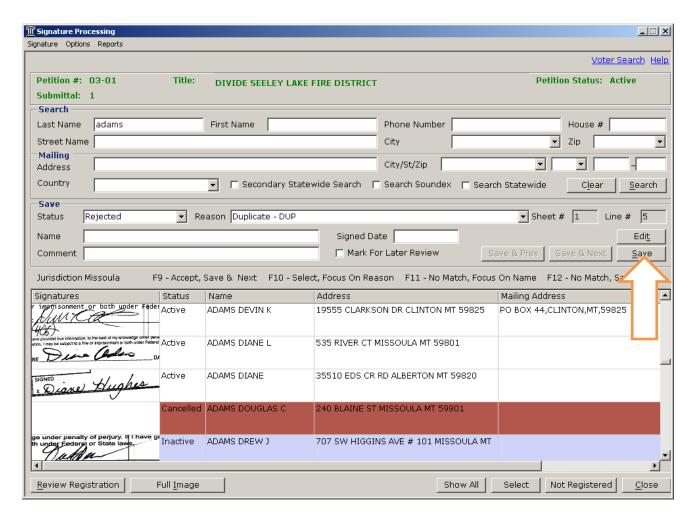
IF AT ANY TIME YOU NEED TO CORRECT A LINE YOU CAN RETURN TO THE PETITION SIGNATURE QUERY SCREEN, CLICK ON THE LINE, AND CLICK THE PROCESS SINGLE RESULT BUTTON TO GAIN ACCESS TO UPDATE ITS STATUS.



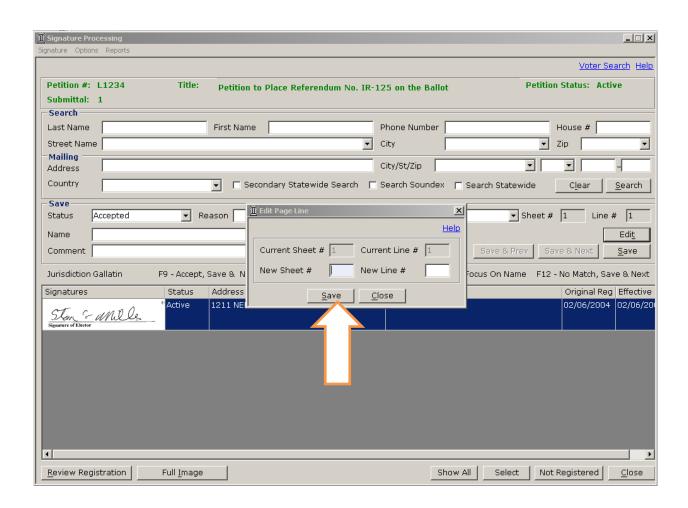
NOTE: IF YOU'VE MISSED A LINE YOU CAN ALSO ADD ADDITIONAL LINES, BY HIGHLIGHTING AN EXISTING LINE AND THEN CLICKING THE "ADDITIONAL LINE BUTTON".

THE NEW LINE WILL ADDED ABOVE THE PREVIOUSLY SELECTED LINE.

When processing a single result such as this, it will only allow you to select the signature and "Save". You will then need to close the screen and then go to the "Next Unprocessed" line.

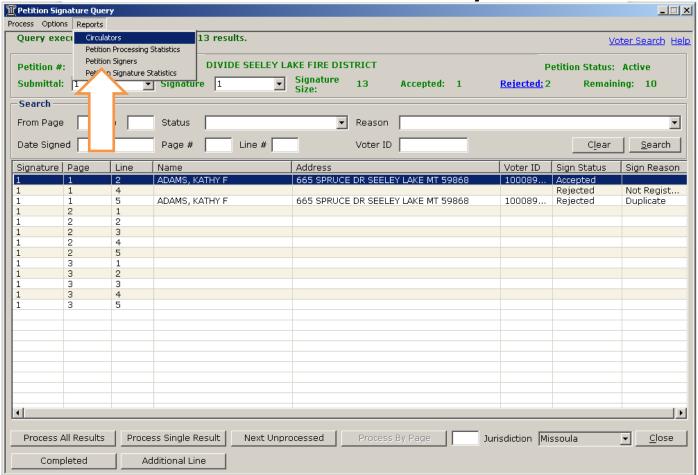


Clicking the Edit button will allow you to edit the sheet number and line number for the signature that you are processing.

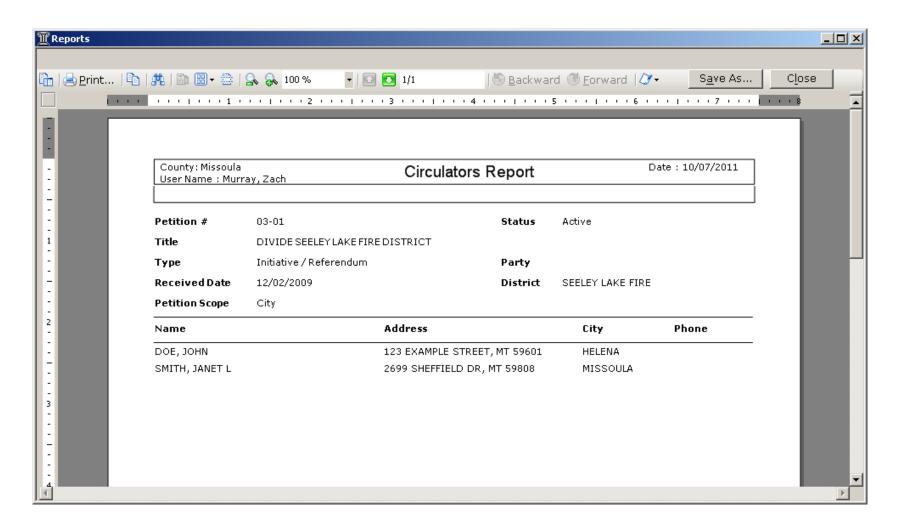


Reports

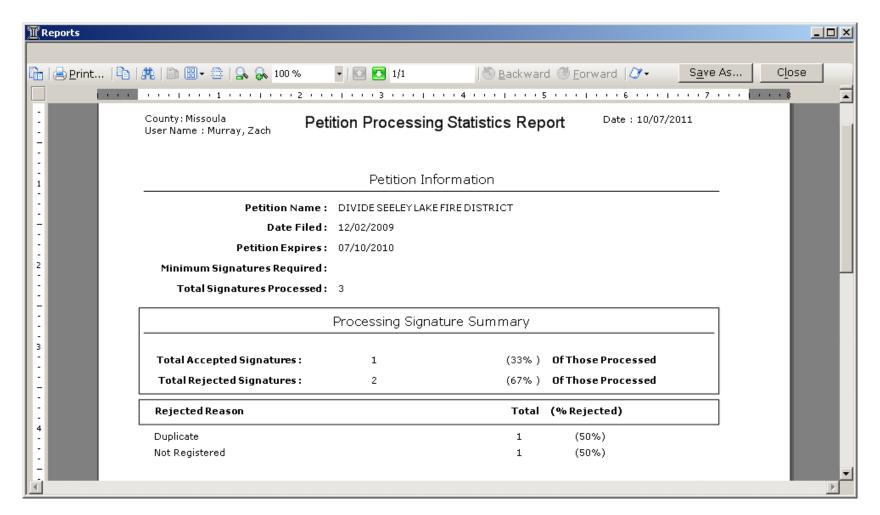
At any time there are several reports that you can run from this Query screen.



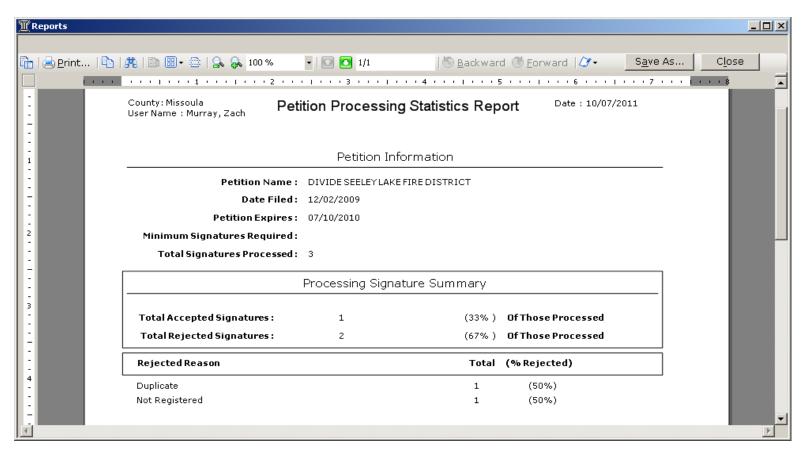
THE CIRCULATOR REPORT DISPLAYS ALL CIRCULATORS ENTERED FOR A PETITION.



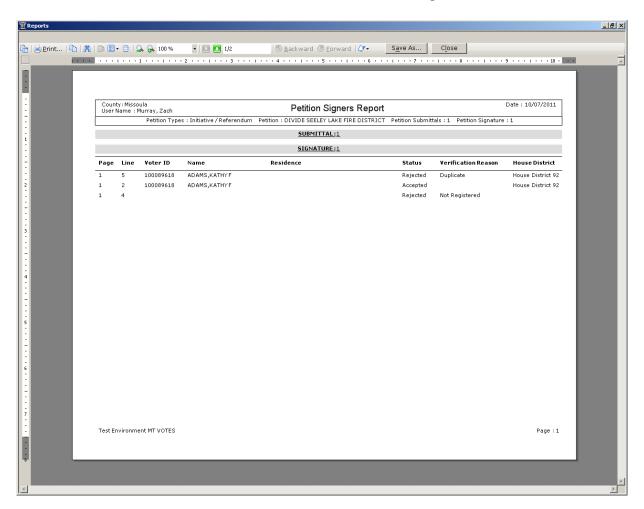
The Petition Processing Statistics Report shows the number of accepted and rejected signatures on the petition, as well as the reasons for the rejected signatures.



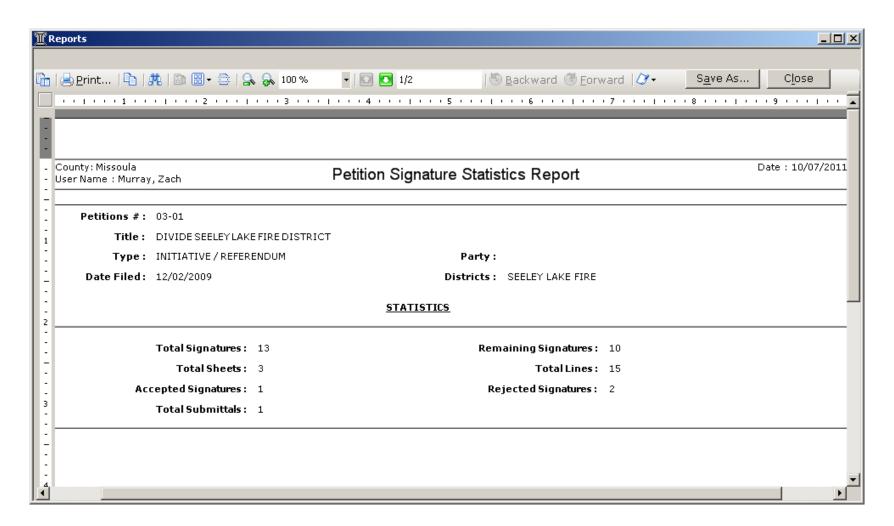
Note: Please be careful about releasing statewide petition totals. Petition sponsors or opponents may think the totals are just for your county. When possible, refer people to the Secretary of State for statewide petition totals.



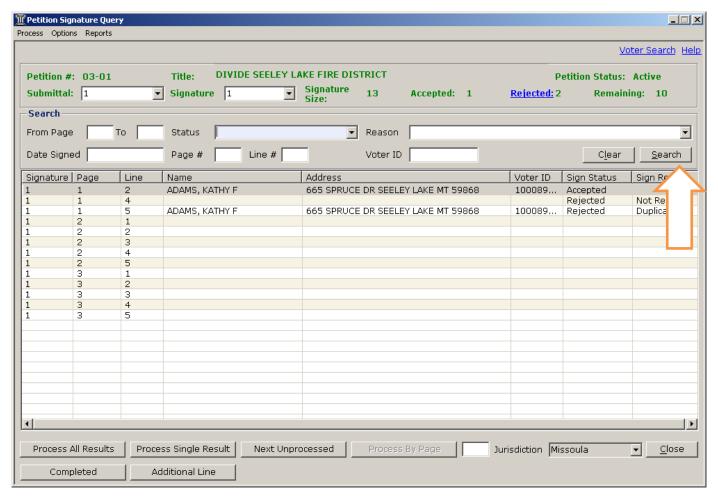
The petition signers report shows all the names on the petition.



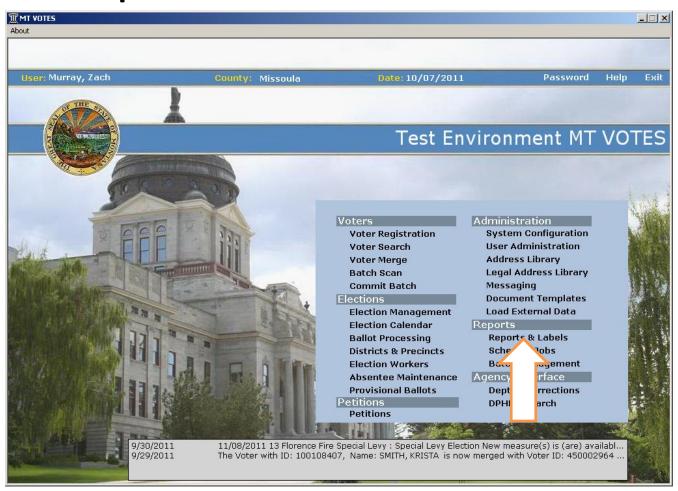
The petition signature statistic report will display statistics for the petition submittals and signatures.



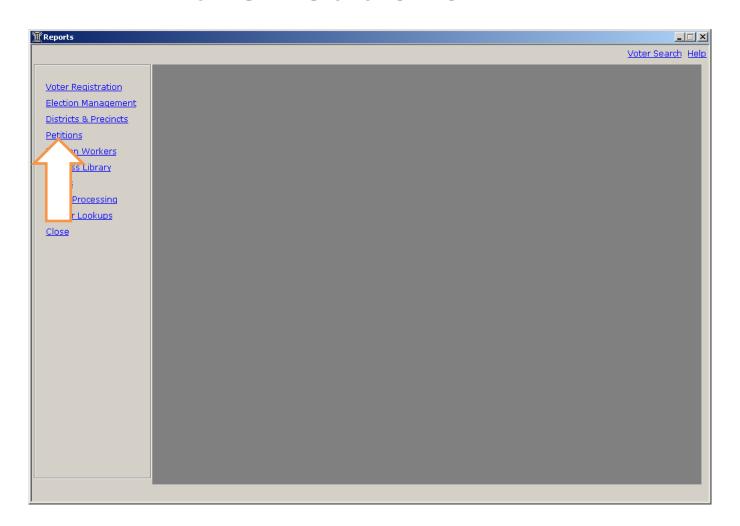
Searches can also be run from the Petition Signature Query screen, including a search for all signatures accepted, signatures rejected by reason, and you can search by page # and line # as well.



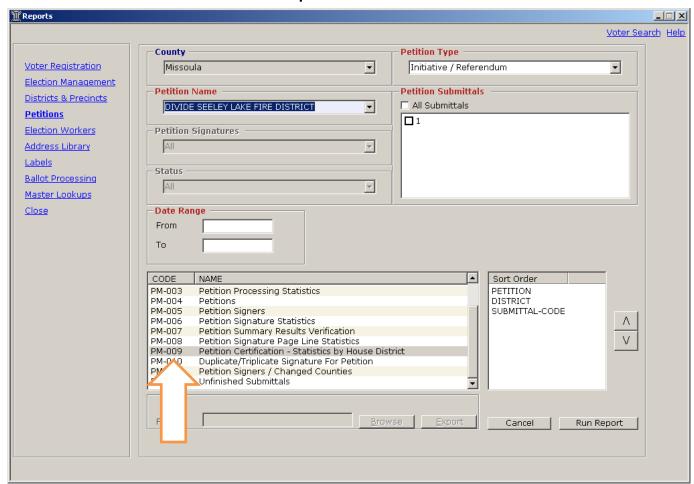
Reports can also be run from the Reports & Labels module.



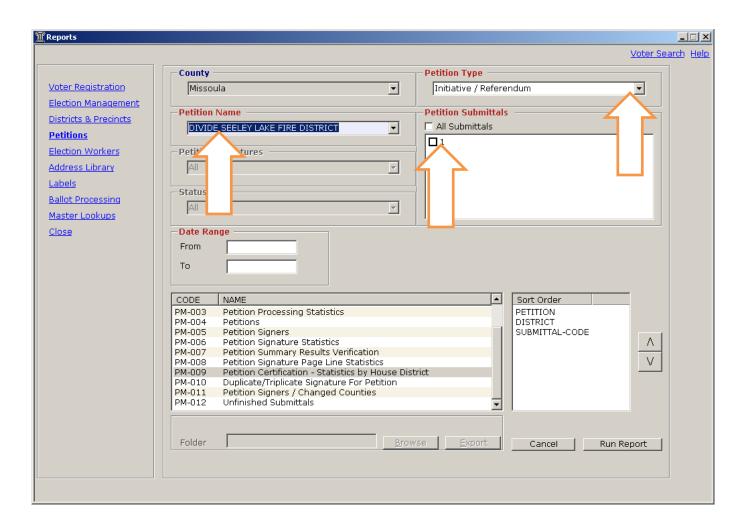
Once in the main reports page, go to the Petitions link



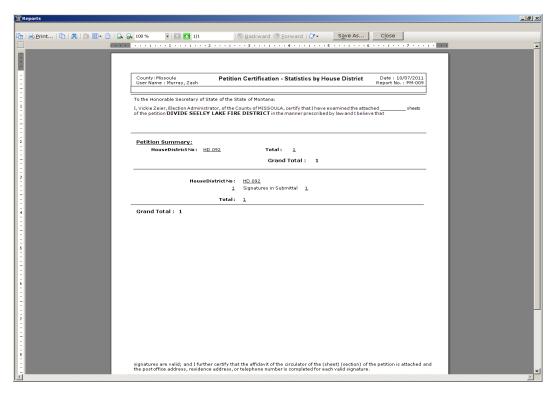
The report that is most often used is the PM-009 which gives the number of verified signatures by House District. This is the report that you will complete and send in to the Secretary of State's office when processing statewide petitions.



If processing a statewide petition, select the Petition name, type and submittal desired



This certification will be attached to the original copy of the signed petitions, completed, and sent into the SOS office by certified mail, within 4 weeks of your receipt of the signed ballot issue petitions.



Note: For statewide candidate petitions and statewide party qualification petitions, send them so that they are received by the SOS within **1 week** of when you receive them, and not later than the final deadline for candidate filing.

Petition Basics to Remember

- 1. Before you send the original statewide petitions, you must make copies of these petitions to keep in your office.
- 2. The deadlines for petitions to be submitted to County Election offices, and for election administrators to file certified ballot issue petitions with the Secretary of State's office, can be found on the SOS website at sos.mt.gov/Elections/Ballot_Issues. Some deadlines are also listed on the Montana election calendar.
- 3. State statute requires that for statewide ballot issues, signature gatherers must be MT residents, and cannot be paid per signature. They do not need to be registered voters, and you are not responsible for policing these requirements.
- 4. Counties can no longer print the abbreviated ballot language the law was changed when the then Attorney General went to vote and found that the polling place did not have the complete text available as required by law.

- 5. A notarized Affidavit of Signature Gatherer must be completed for each submittal. A submittal can be up to 25 petition sheets. For example, if a signature gatherer brings in 35 petition sheets they will have to have 2 affidavits attached. (1 for 25 pages and the second one for the 10 remaining pages)
- 6. If you are not sure of the answer to a statewide petition question, contact the Secretary of State's office elections division at soselections@mt.gov or at (406) 444-5346.
- 7. For a local petition, refer to 7-5-101 through 7-5-140, MCA and ask your city or county attorney for assistance. If they are unsure of the answer have them contact the Secretary of State's office.

As always, please feel free to contact the Help Desk, at 1-866-541-6767, with any further questions you have.

